

Fig. 1

37

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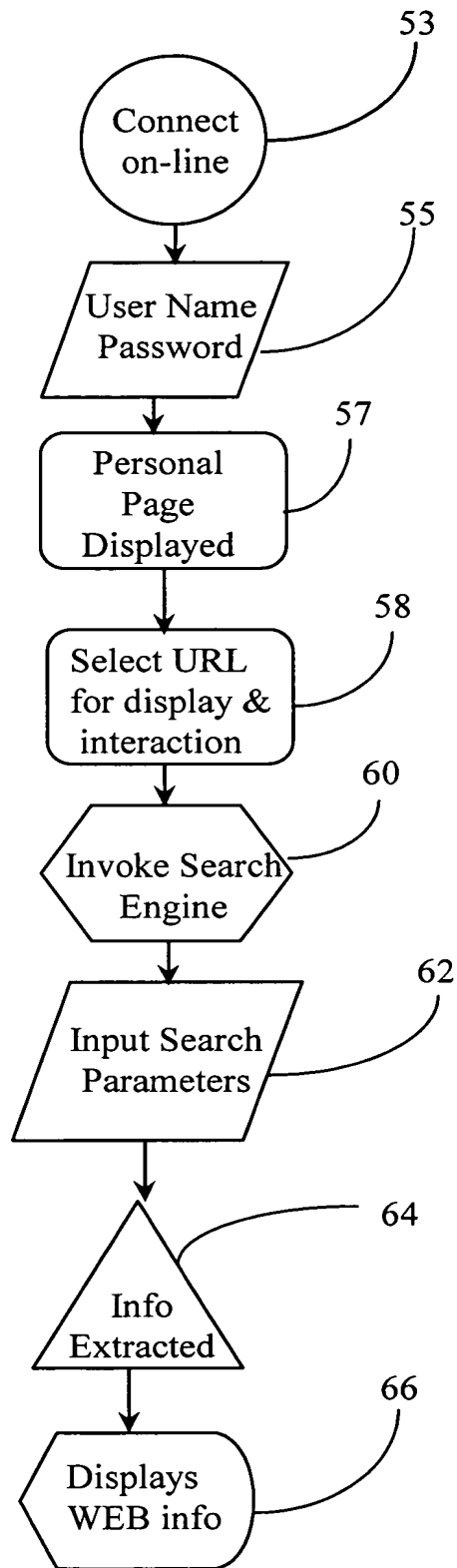
Internet Portal.com (personalized page)

Search	Server Name	User Name	Password
Agent	LBC.com	John Doe	XXXXXXX
Last	My Bank.com	John R. Doe	XXXXXX
Update	My Stocks.com	John R. Doe	XXXXXXXXXX
ADD	My Shopping.com	Jane L. Doe	XXXXXXX
	Mortgage.Com	John/Jane Doe	XXXXXXXXXX
	Airline.com	John Doe	XXXXXXX

Search String  51

52

Fig. 2



**Fig. 3**

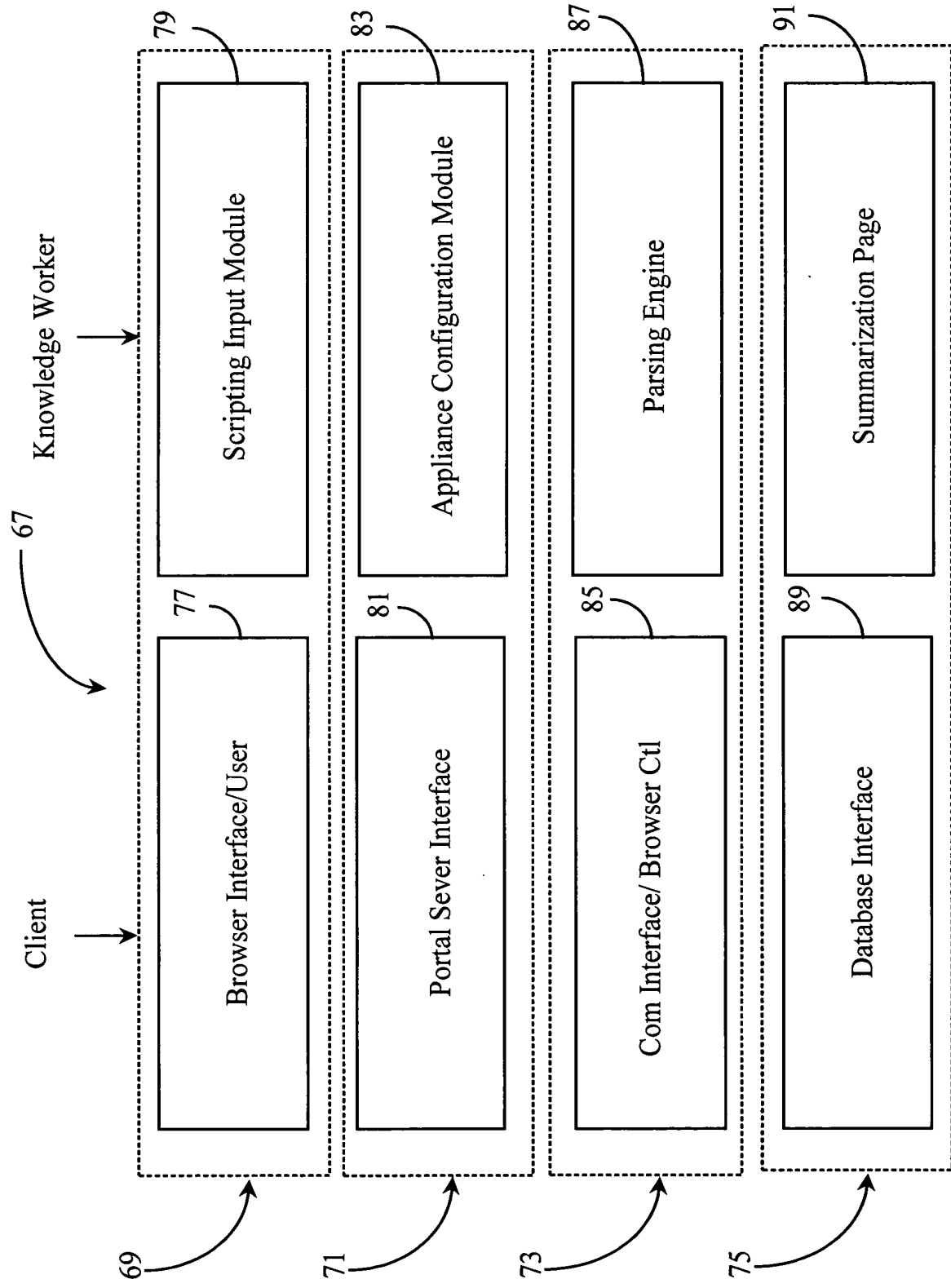
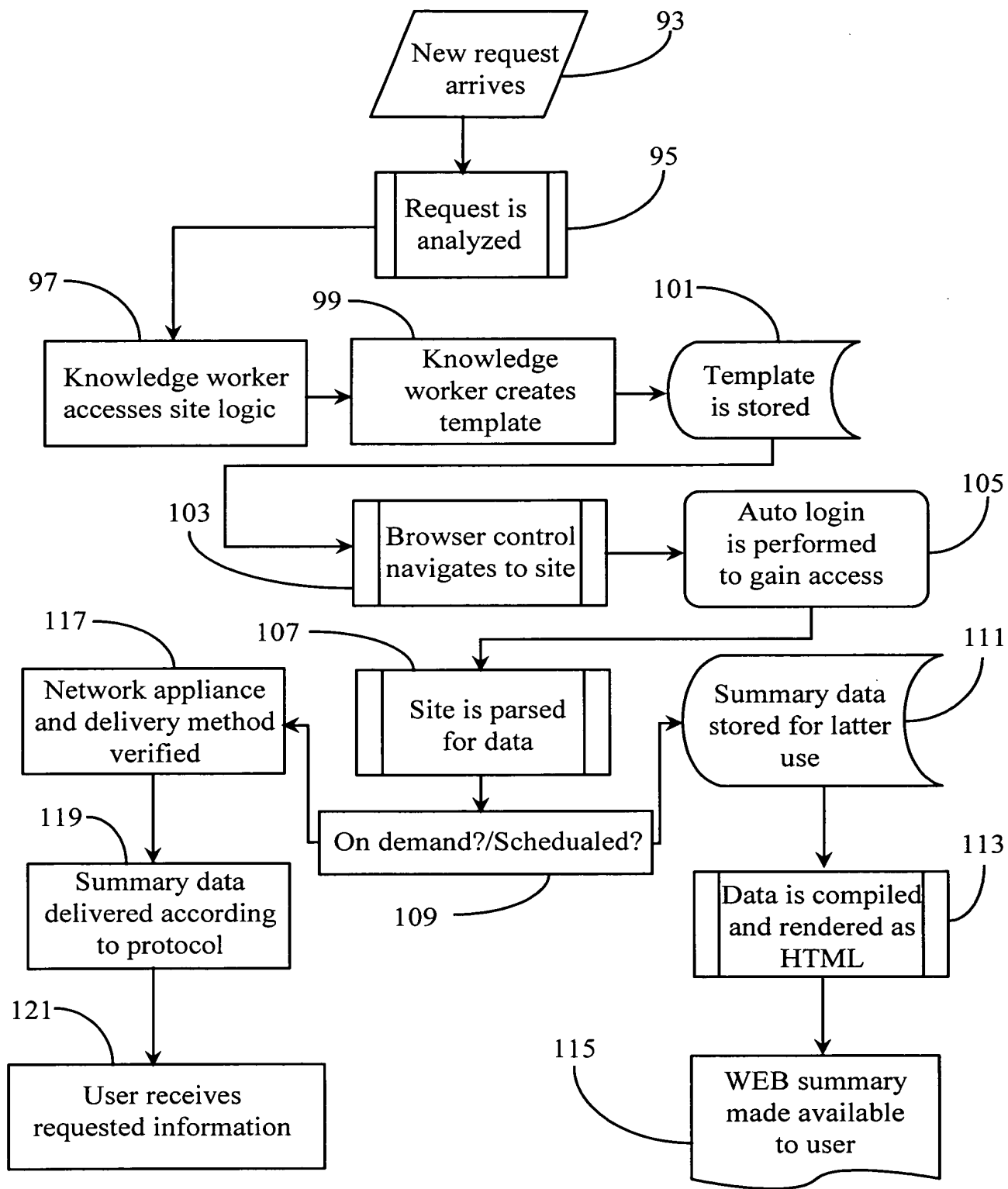
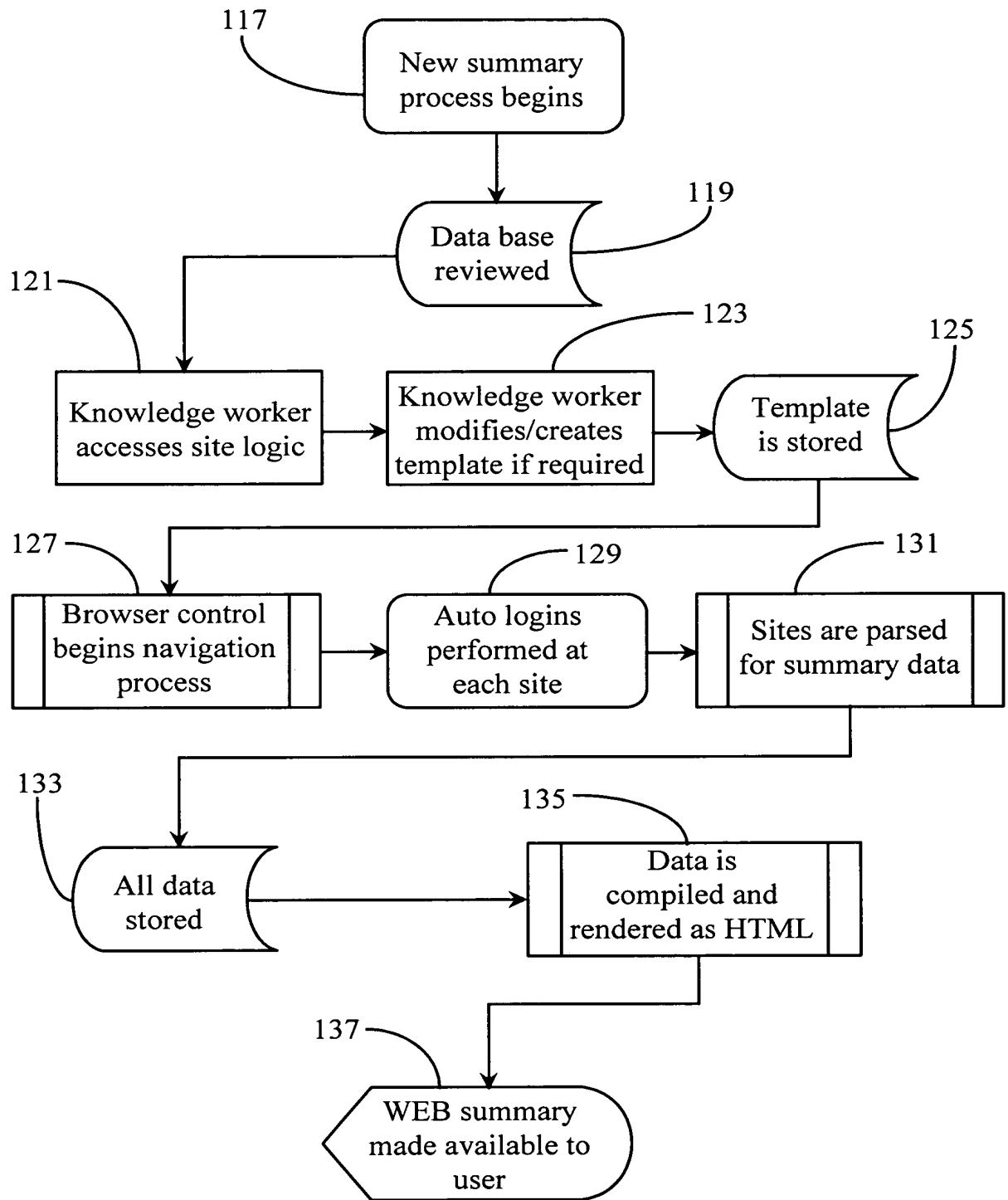


Fig. 4



**Fig. 5**

FIG. 6



**Fig. 6**

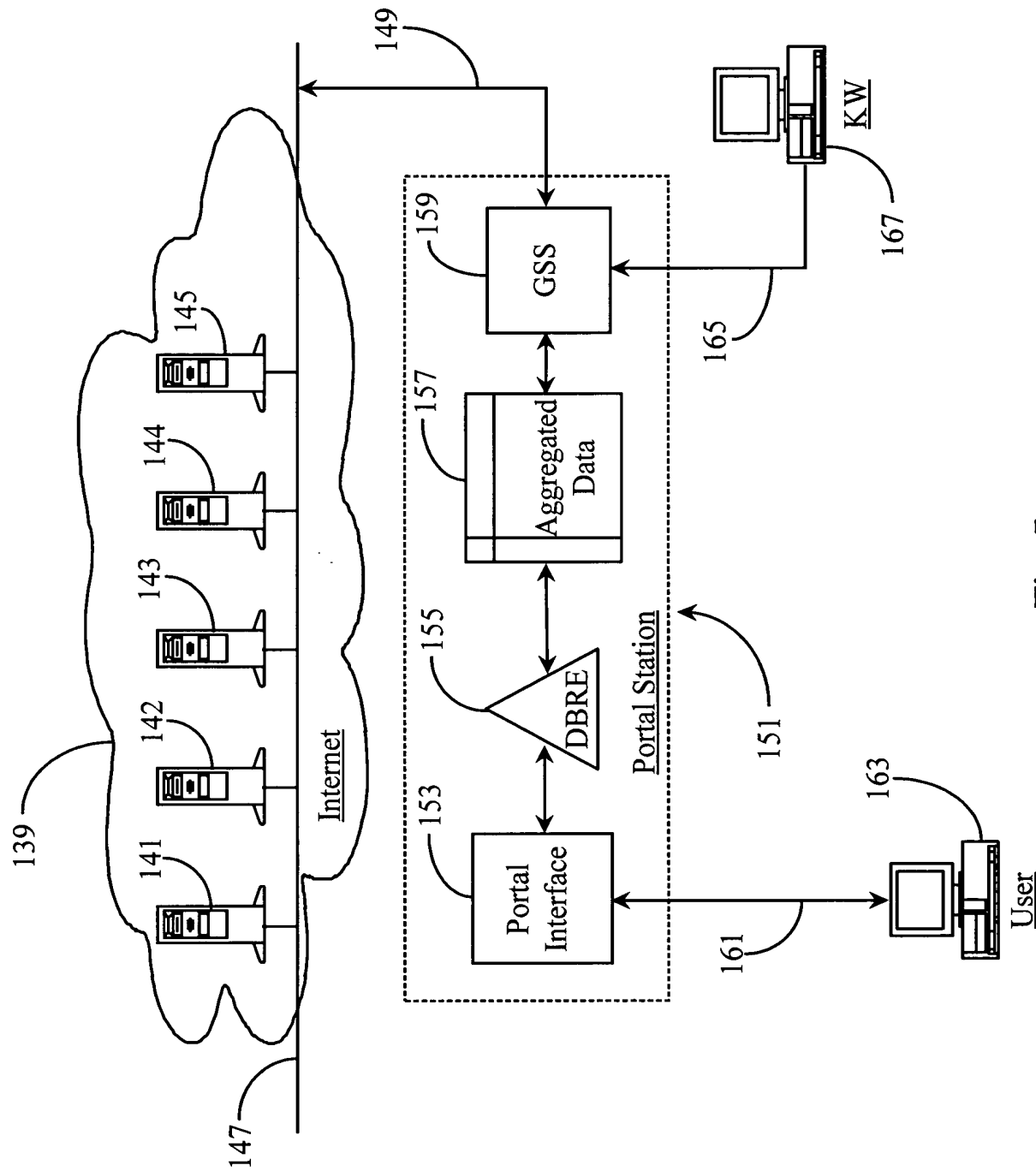


Fig. 7

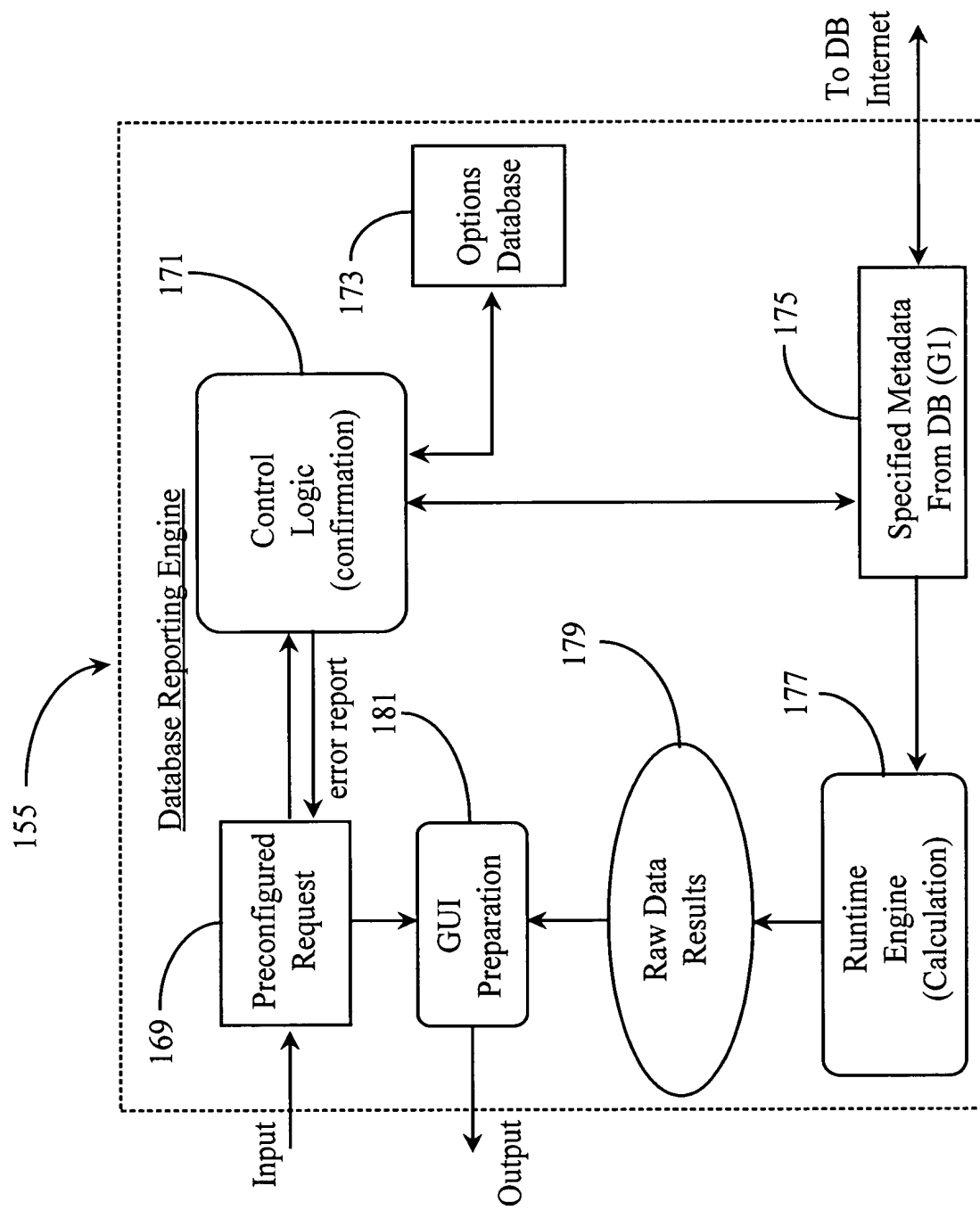
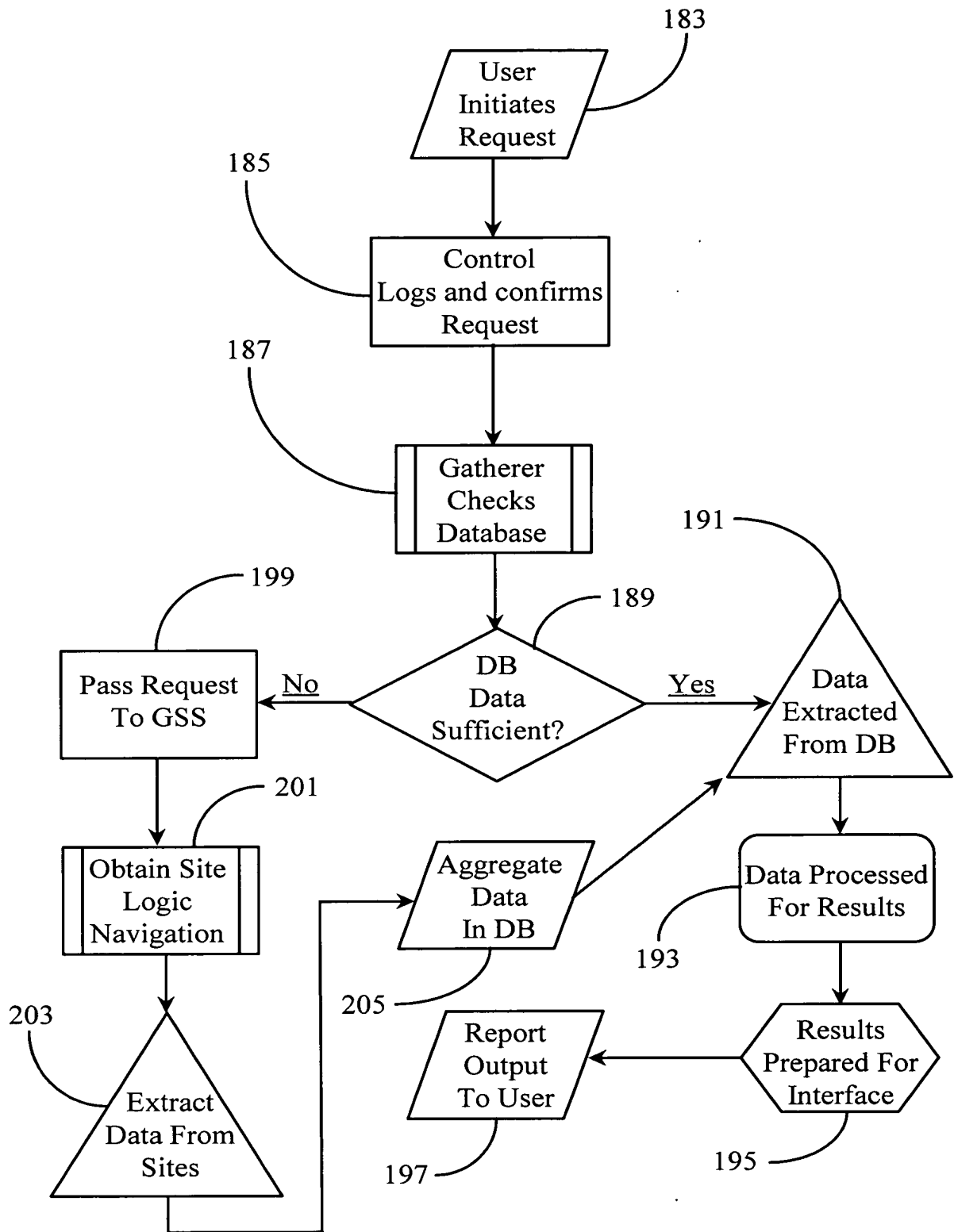


Fig. 8





**Fig. 9**

100450 2245360

207

Personal's Yodlee - Microsoft Internet Explorer

File Edit View Favorites Tools Help

Back Forward Stop Refresh Home Search Favorites History Mail Print Related

Address [http://sunserver.20000/magic/login?int\\_anchor=b174b&jint\\_tab\\_id=45fb174b](http://sunserver.20000/magic/login?int_anchor=b174b&jint_tab_id=45fb174b)

Links

**Banks** Add Edit Hide

**Stanford Federal Credit Union** Edit

Account	Balance
Savings - 1	0.15

Last Refresh: 8 days ago Refresh Edit

**Wells Fargo** Edit

Account	Balance
CHECKING	34973.92
CHECKING	35457.68
MRA	40779.89
SAVINGS	101.60

Last Refresh: 8 days ago Refresh

**Bank Summary**

Summary	Amount
TOTAL BALANCE	111313.24

**Investments** Add Edit Hide

**Datek Online** Edit

Symbol	Quote	Quantity	\$ Change
CSCO	69	1	- 3/8
HLIT	112 3/8	1	-4 5/16
portfolio_balance			N/A
Total Account Balance			2029.55

Last Refresh: 2 hrs ago Refresh

**Investment Summary**

Summary	Amount
TOTAL STOCK BALANCE	181.375
TOTAL ACCOUNT VALUE	2029.55

209

Fig. 10

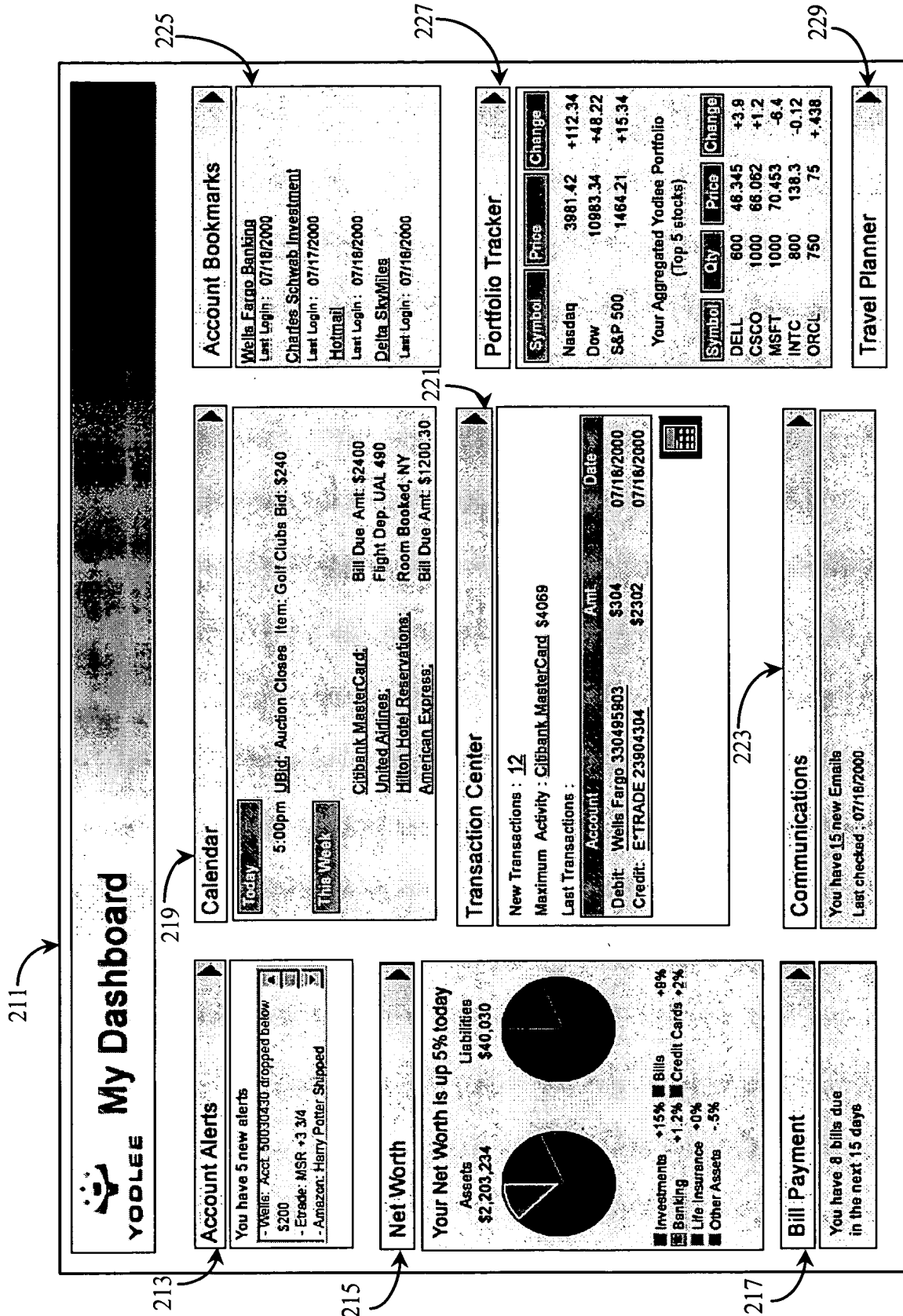


Fig. 11

Click on an Account to log in

YODLEE

# My Dashboard

## YODLEE CALENDAR

**JULY 18 - 24, 2000**

**Print**

Tuesday July 18th

6:00pm UBid: Auction Cosing - Item: Golf Clubs HighBid: \$240

Wednesday July 19th

8:00am United Airlines: Flight Departure - Flight # UAL490 Departing SFO

10:00am Hilton Hotel Reservations: Room Booked - New York Hillon, Single Room

Thursday July 20th

All Day Citibank MasterCard: Bill Due - Amt. \$2400

Friday July 21st

6:00am - 9:00am Tee Time - Silver Vista Golf Club. Call Jim.

Saturday July 22nd

All Day Amazon.com: Back Order 1205043 Due to ship - Item: Harry Potter Price: \$20

All Day PacificBell: Bill Due - Amt. \$100

Sunday July 23rd

All Day PG&E: Bill Due - Amt. \$100.34

Monday July 24th

All Day American Express: Bill Due - Amt. \$1200.30

Today is July 18th, 2000

**Add**

**Show**

☒ Auctions

☒ Shopping

☒ Travel

☒ Bills

☐ Banking

☒ Credit Cards

☒ Investments

235

237

239

241

**Fig. 12**



257

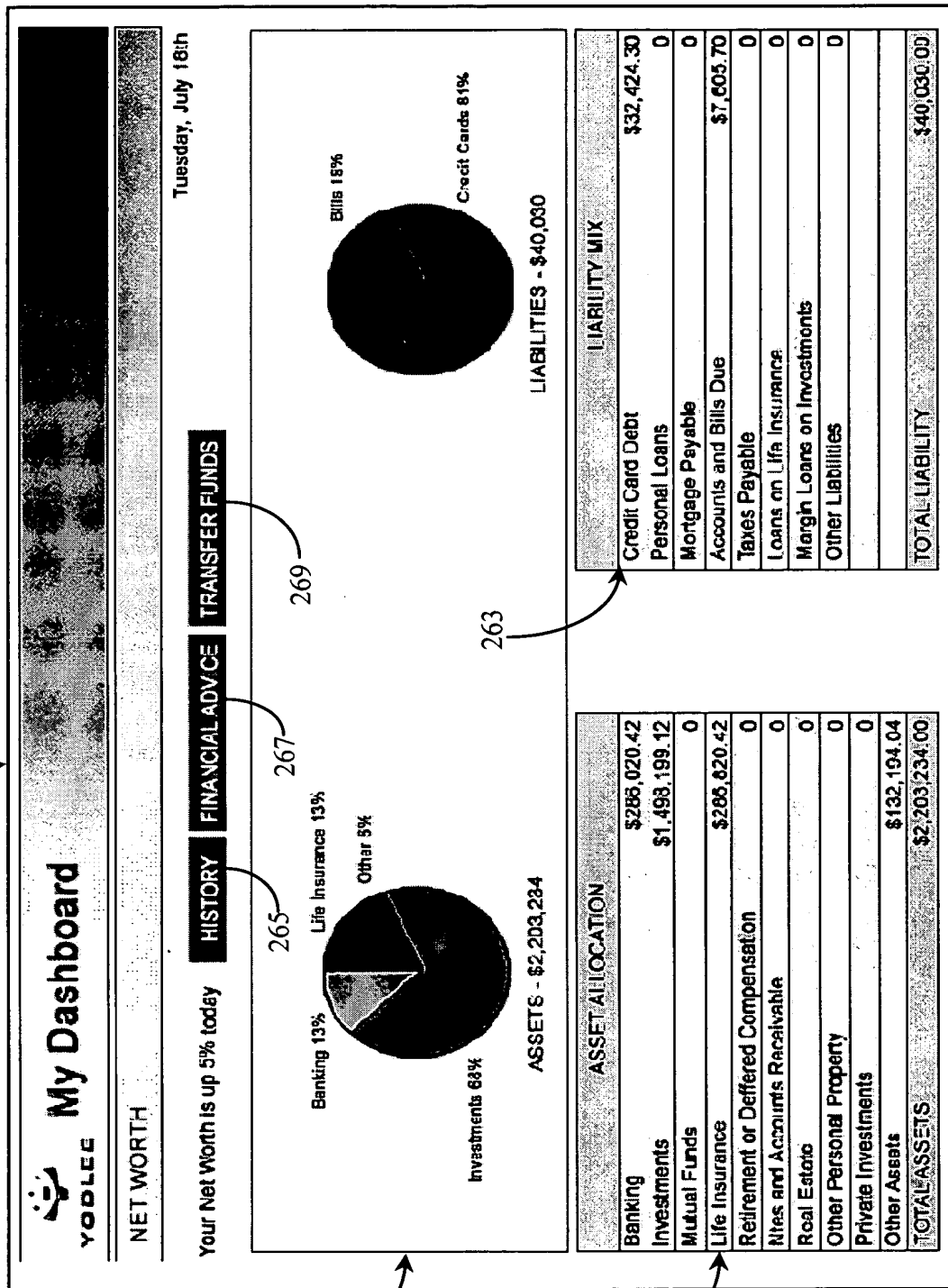


Fig. 14

100T50 224560

271 →

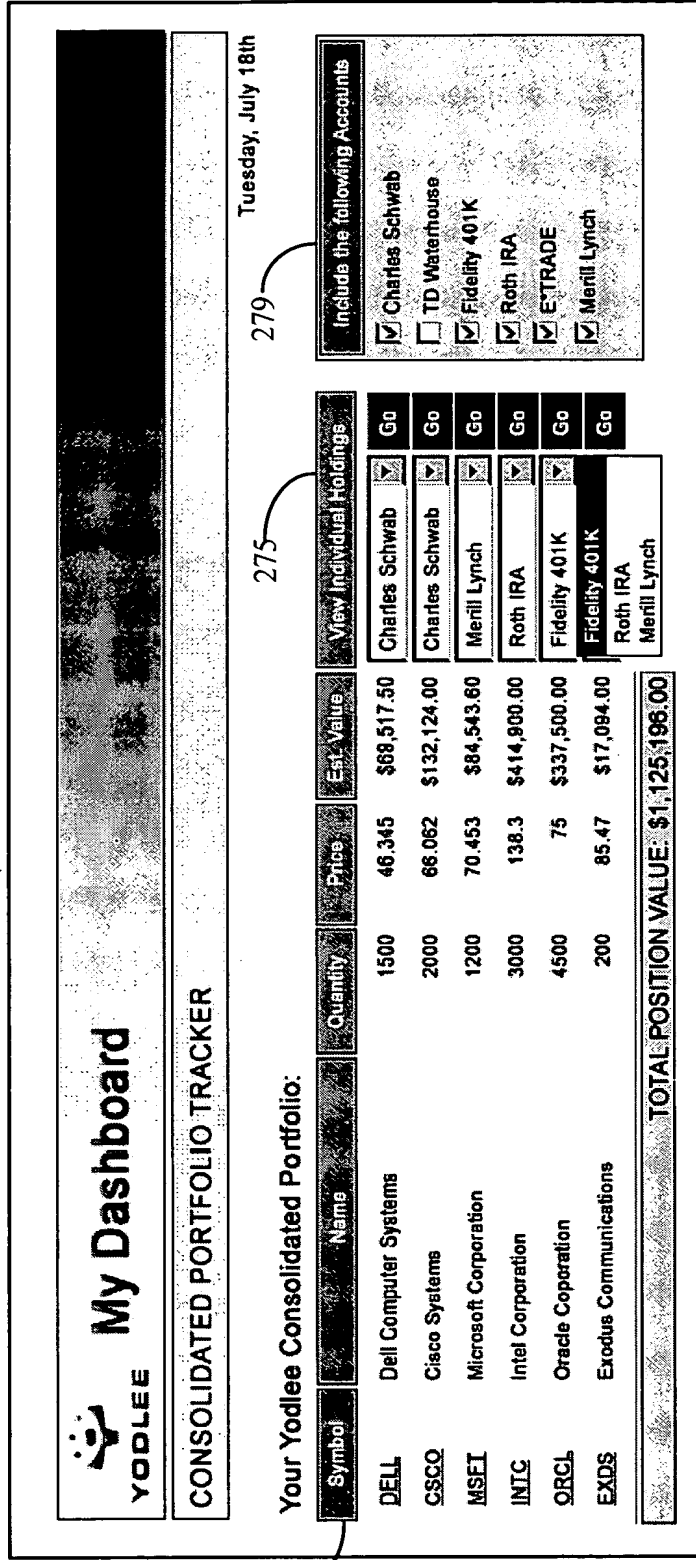


Fig. 15

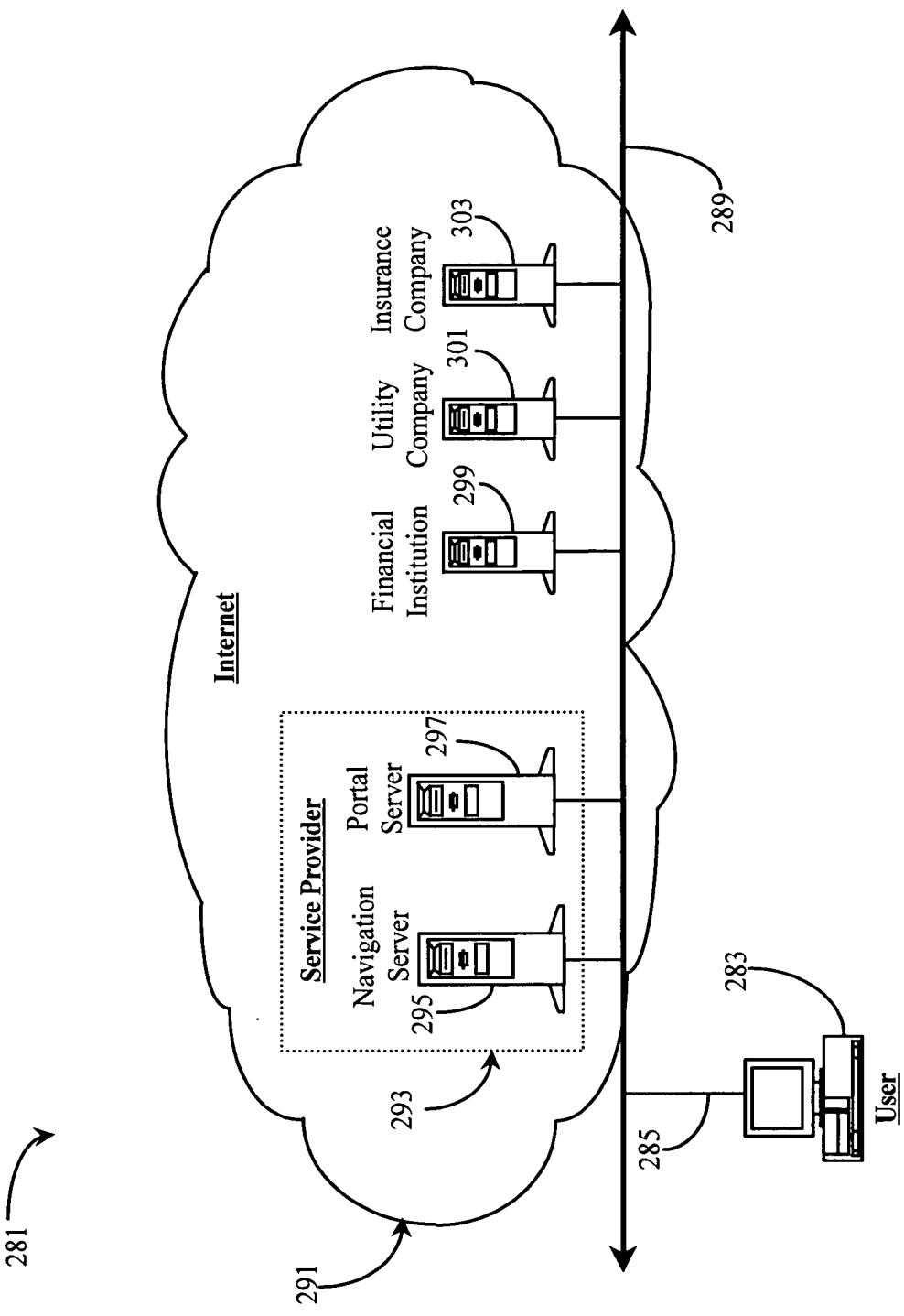


Fig. 16



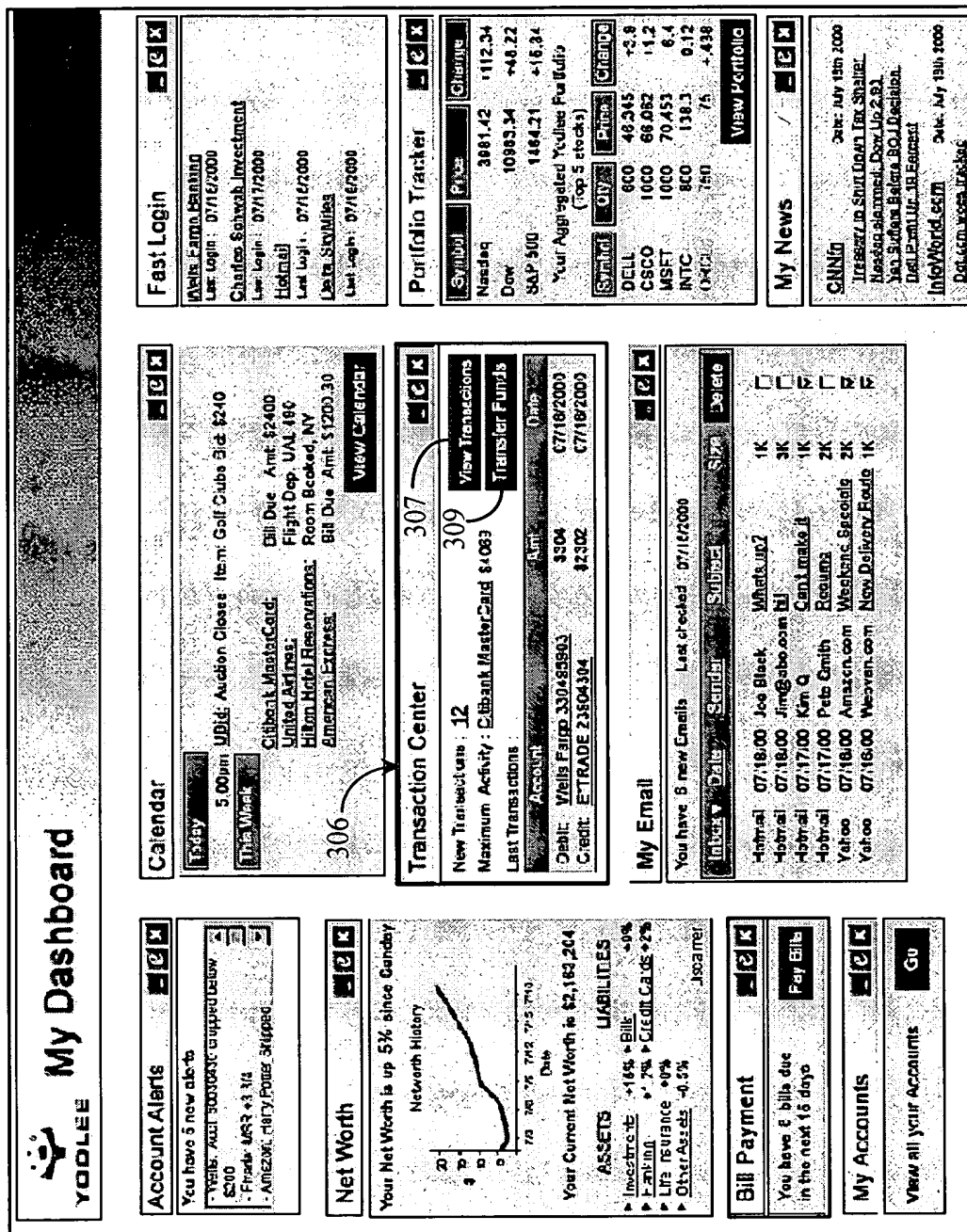


Fig. 17

700750-224530

## Transaction Center - Default View

TRANSACTION CENTER

New Transaction Summary

All Accounts: 12 new transactions

Chase Visa Credit Card : 5 new transactions

Wells Fargo Savings : 3 new transactions

Wells Fargo Checking : 2 new transactions

E-TRADE : 2 new transactions

New Transactions: All Accounts

Date	Description	Account	Amount	Category
07/14/2000	Pizza Hut, San Jose CA	Chase Visa Credit Card	\$34.12	Food and Beverage
07/15/2000	AT&T Wireless, CA	Wells Fargo Savings	\$19.99	Utilities
07/16/2000	BEST BUY, Redwood City	Wells Fargo Checking	\$340.23	Home
07/17/2000	Honda City, San Jose, CA	Wells Fargo Checking	\$72.54	Auto
07/18/2000	Pomona College, San Jose CA	E-TRADE	\$100.00	Charitable Contribution

Save Categories

Transaction History

Bill Payment

Fig. 18

# Transaction Center: One Account View

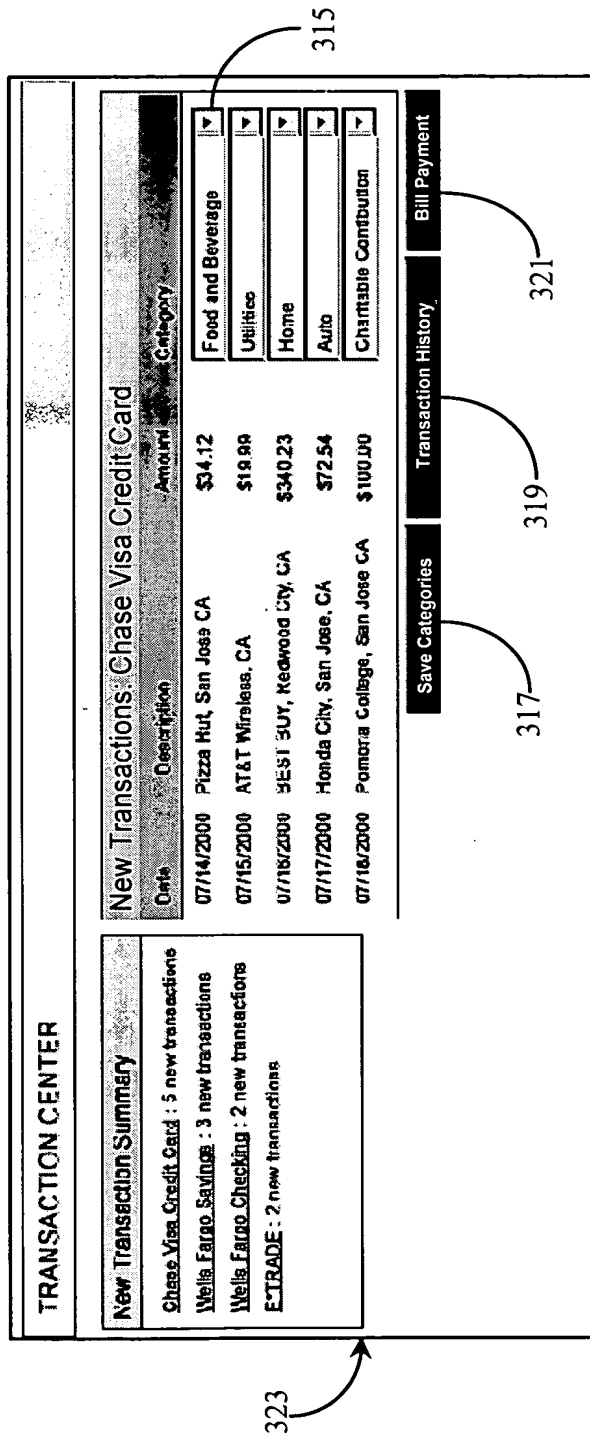


Fig. 19

FOOTNOTES

## Transaction Center: Transaction History / All Accounts

TRANSACTION HISTORY

Select an Account

All Accounts

Chase Credit Card

American Express

BankOne Checking

Select a Timeframe:

YTD

This Month

Last 6 months

Last 12 months

Select a View:

By Category

Chronological

Auto

Charitable Contributions

Entertainment

Food and Beverage

Display

Transaction History - All Accounts

Chart it

Date	Description	Category	Account	Amount
01/03/00	Payment to Bob Formichi	Housing	BankOne Checking	\$1,600.00
01/03/00	Final Final	Food and Beverage	Chase Mastercard	\$27.85
01/03/00	The Fillmore	Entertainment	American Express	\$154.32
01/05/00	Brake Repair Shop	Auto	Chase Mastercard	\$553.36
02/04/00	Payment to Bob Formichi	Housing	Chase Mastercard	\$800.00
02/04/00	Shereline Amphitheater	Entertainment	Chase Mastercard	\$88.44
03/04/00	Big O Tires	Auto	American Express	\$432.21
03/08/00	TicketMaster	Entertainment	BankOne Checking	\$145.34
03/08/00	Payment to Bob Formichi	Housing	BankOne Checking	\$800.00
04/07/00	Clementines	Food and Beverage	Chase Mastercard	\$167.67
04/15/00	American Heart Association	Charitable Contributions	First USA Card	\$200.00
04/31/00	Great American Music Hall	Entertainment	American Express	\$198.20
04/31/00	Payment to Bob Formichi	Housing	American Express	\$800.00
Expenses				\$6,067.39

Previous

Next

Edit Categories

Fig. 20

# Transaction Center: Transaction History / All Accounts - By Category; YTD

TRANSACTION HISTORY

Select an Account:

All Accounts

Chase Credit Card

American Express

BankOne Checking

Select a Timeframe:

YTD

This Month

Last 6 months

Last 12 months

Select a View:

By Category

Chronological

Auto

Charitable Contributions

Entertainment

Food and Beverage

Display

Transaction History - All Accounts

Date	Description	Category	Amount
01/05/00	Brake Repair Shop	Auto	\$553.36
03/04/00	Big O Tires	Auto	\$432.21
Auto Total			\$985.75
02/05/00	Pomona College	Charitable Contributions	\$100.00
04/15/00	American Heart Association	Charitable Contributions	\$200.00
Charitable Contributions Total			\$300.00
01/03/00	The Fillmore	Entertainment	\$154.32
02/04/00	Shoreline Amphitheater	Entertainment	\$88.44
03/08/00	TicketMaster	Entertainment	\$145.34
04/31/00	Great American Music Hall	Entertainment	\$198.20
Entertainment Total			\$586.30
01/03/00	Final Final	Food and Beverage	\$27.85
04/07/00	Clementines	Food and Beverage	\$167.67
Food and Beverage Total			\$195.52
01/03/00	Payment to Bob Formichi	Housing	\$1,600.00
02/04/00	Payment to Bob Formichi	Housing	\$800.00
03/08/00	Payment to Bob Formichi	Housing	\$800.00
04/31/00	Payment to Bob Formichi	Housing	\$800.00
Housing Total			\$4,000.00
Expenses YTD			\$6,067.39

Chart It

Edit Categories

Fig. 21

# Transaction Center: Transaction History / Bar Graph

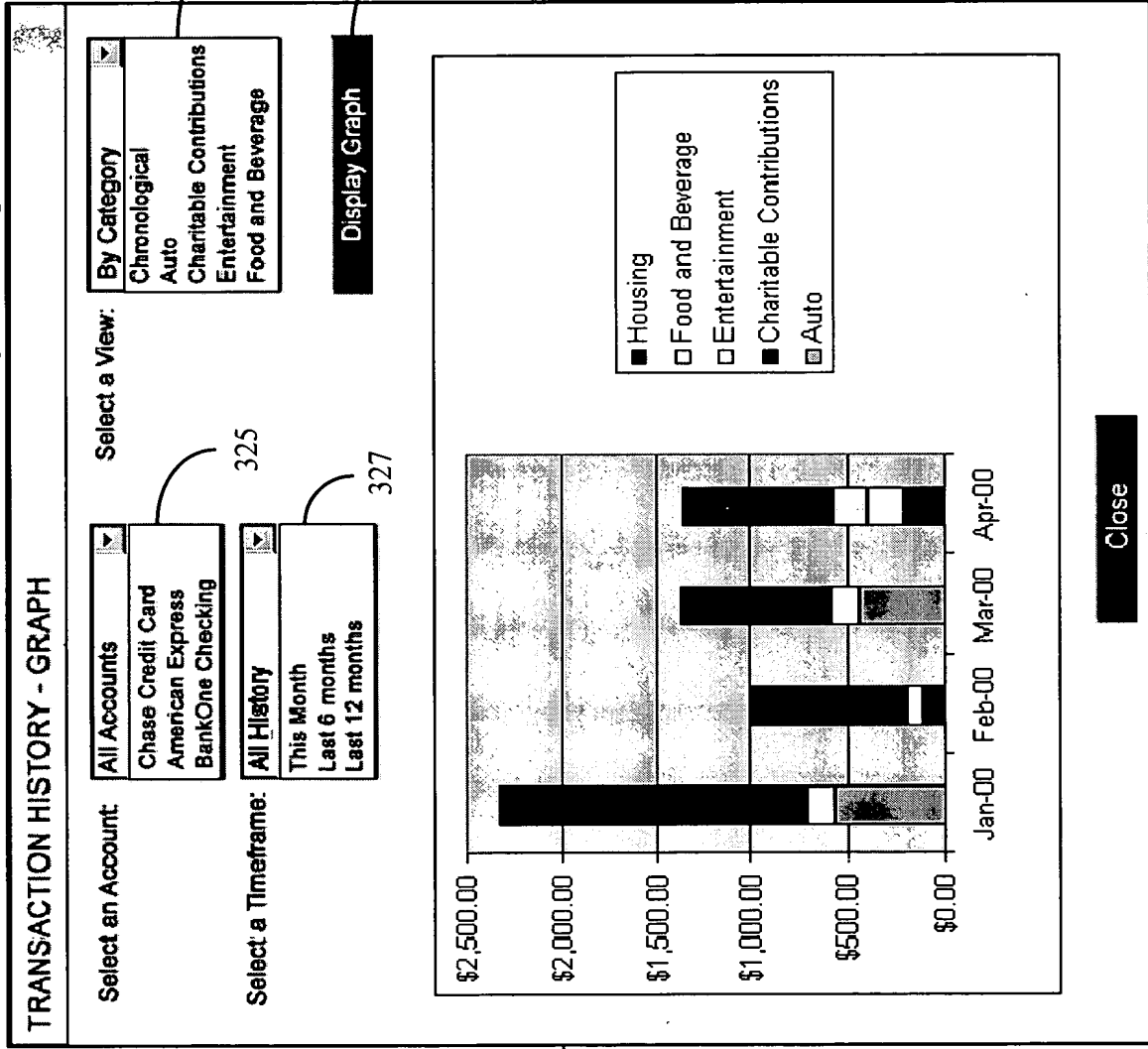


Fig. 22

# Transaction Center: Transaction History / Line Graph

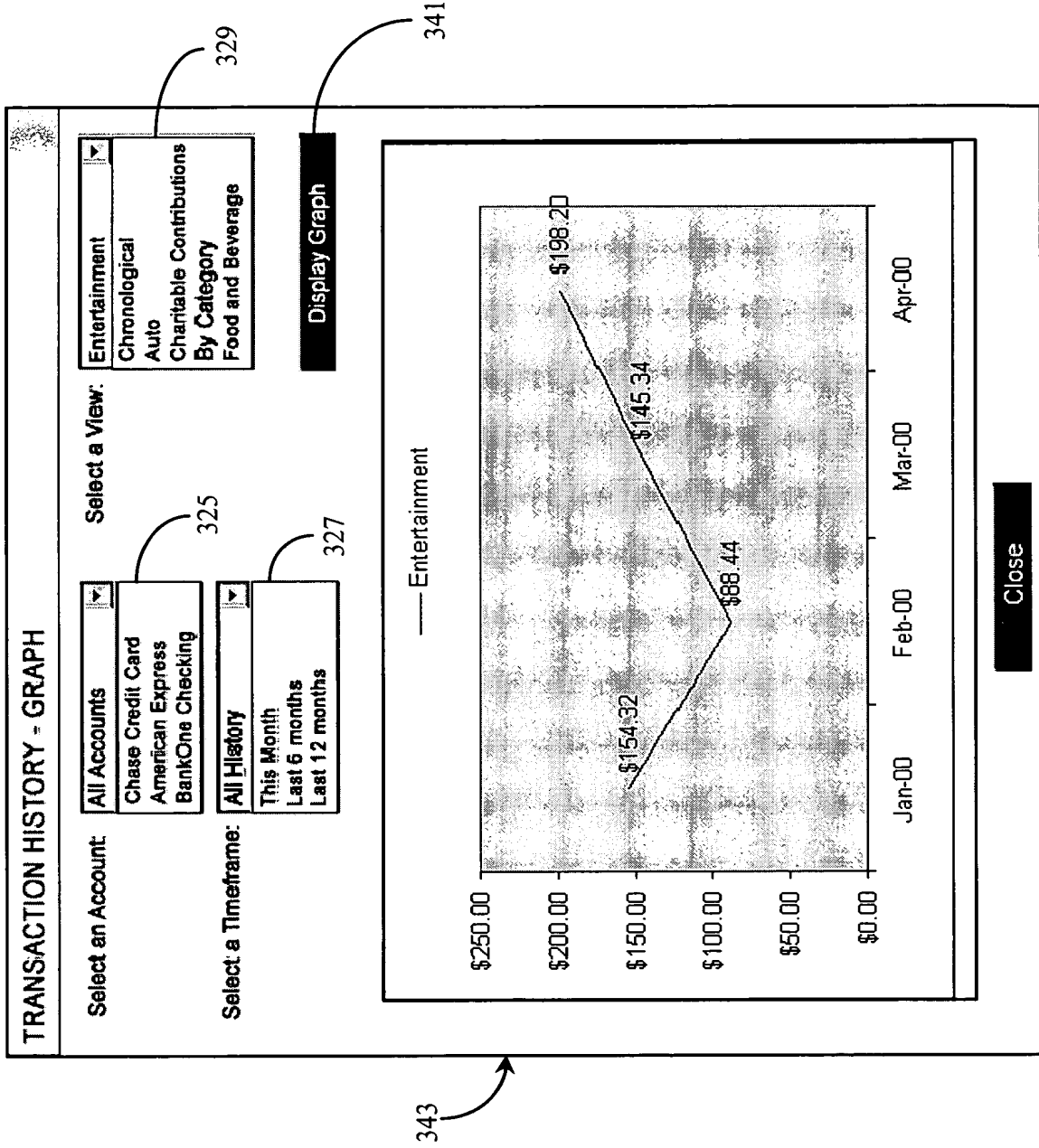


Fig. 23

**Fig. 24**



# Transfer Funds

TRANSFER: \$500

ON: 09/20/00

FROM:

Wells Fargo Banking - 1234567-xxx  
BankOne - 238036798  
E\*TRADE - 98765-43xx  
Wells Fargo Banking - 1234567-xxx  
Wells Fargo Banking - 7074343-xxx

TO:

BankOne - 238036798  
BankOne - 238036798  
E\*TRADE - 98765-43xx  
Wells Fargo Banking - 1234567-xxx  
Wells Fargo Banking - 7074343-xxx

Add a New Account

Cancel

Transfer Funds

345

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Pending Transfers

Transfer Date	From	To	Amount
09/03/00	Wells Fargo Banking 123456780-xxx	E*TRADE 987654321-xxx	\$5000.00

Inquire

Least 10 Transactions

Date	Status	From Account	Payee	Amount
08/08/00	Pending	Wells Fargo Banking	Funds Transfer to E*TRADE	\$5000.00
08/12/00	Complete	Fidelity MMA	Landlord	\$1,500.00
08/11/00	Complete	Wells Fargo Checking	AT&T	\$32.87
08/11/00	Complete	Wells Fargo Checking	PacBell	\$33.06
08/10/00	Complete	PayPal	John Smith	\$100.00
08/10/00	Complete	Fidelity MMA	State Farm Insurance	\$240.00
08/04/00	Complete	Prudential	Funds Transfer to E*TRADE	\$1,000.00
09/05/00	Complete	E*TRADE	Funds Transfer to BankOne	\$500.00
09/02/00	Rejected	PayPal	Patty Neal	\$32.15
08/02/00	NSF	ChilBank Mastercard	ChilBank Checking	\$1,032.10

More Transactions

Active Balance

Wells Fargo Banking - 1234567-xxx

Current Balance:	\$3,000.25
Wells Fargo Mastercard:	(\$2,400.00)
Final Balance:	\$600.25

BankOne - 238036798

Current Balance:	\$2,204.21
American Express:	(\$1,000.00)
Final Balance:	\$1,204.21

View Balances

Fig. 25

### Edit Account List

Edit Account Lists	
<input type="checkbox"/>	American Express - 3333-3333-3333-xxxx
<input type="checkbox"/>	BankOne - 12333-33xxx
<input type="checkbox"/>	Chase Mastercard - 1234-4567-3456-xxxx
<input type="checkbox"/>	Fidelity Investments - T9999-3333
<input type="checkbox"/>	Wells Fargo Banking - 12345678-xxx
<div>OK Cancel</div>	

359



Fig. 26

Account Information

ACCOUNT INFORMATION

We need some additional information to complete this transaction

Enter your complete Wells Fargo Account Number

1234567-888

Enter your complete BankOne Account Number

9878988-xxx

Enter your BankOne Routing Number  
(this is the 9 digit number on the bottom of your check)

OK

Cancel

361

Fig. 27

Account Information - Confirmation

TRANSFER CONFIRMATION

You have requested the following transaction

Transfer	\$500	from	Wells Fargo Banking - 1234567-888
		to	BankOne - 2398036798
		Routing #	987987987
		on	09/20/00

Please confirm these fund transfer details :

OK

Edit

Cancel

363

Fig. 28